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TOWARD A BETTER UNDERSTANDING OF THE MATURE TRAVELER

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ABSTRACT

As the population ages, the demand for travel and leisure services will increase. Marketers in these fields need a broad-based understanding of the aging process. The mature market has been segmented on demographic and lifestyle characteristics. A sociological perspective on aging includes the role transitions older people undergo as important determinants of behavior. This paper presents the variety of roles older people perform and discusses how travel can support these roles and enhance life satisfaction.

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INTRODUCTION

Changing demographics in this and future decades demand the attention of service providers in all areas of business. As the population ages, more and different consumer needs will challenge the service marketer. One area of business which has recognized this aging phenomenon is the travel industry. More research about the mature market, however, could significantly improve the delivery of travel and leisure services to older members of the population. This paper will address the changing roles of mature consumers and the marketing implications for the travel industry.

THE MATURE MARKET

Marketers are aware of the aging of the population and its projected impact on society and business (12, 21, 27). Demographic information abounds regarding the size and market potential of the mature market. For the first time, those over age sixty outnumber teenagers in the U.S. There are more older people who are in better health and more active, with more discretionary income, and more often retired than working than at any other time in history. There is little agreement on what age

marks the onset of "maturity": 50, 55, 62, and 65 have been used. However, the heterogeneity of the nearly sixty million older consumers is widely recognized. The mature market is represented by many age groups (55-64, 65-74, 75-84, 85+), all levels of income, education, work and health status, and thus present different needs. We may begin with a demographic profile of the older segments of the population, but further investigation into the aging process and its effect on behavior is necessary in order to produce meaningful marketing programs.

One often overlooked point is that the phenomenon of aging is not limited to the United States (26). The U.S. experience mirrors international demographic trends. In 1985, 12% of the U.S. population was 65 years of age and older. At the same time, twelve European countries had greater proportions of their populations over age 65. For example, 12.5% of the Hungarian population is over 65 and Sweden is the world's "oldest" country with 16.9% of its population over 65 (22). An understanding of the international mature market would allow marketers to serve more effectively the needs of travelers from around the globe.

THE MATURE TRAVELER

A call for more research concerning the over-50 traveler has been made by travel and tourism researchers (7, 17, 23) because the travel industry will be particularly affected by the aging demographic trend (10, 26, 15). Today's older consumers have been exposed to international travel and will continue to travel, especially now that they can. They are experienced, well-educated travelers who are physically and financially able to take advantage of travel opportunities (4). These circumstances lead travel to be "the principal indulgence of many elderly people" (27, p. 43).

Who are the older travelers? Data are collected on a quarterly basis by the U.S. Travel Data Center on travel activity in the United States. The Winter 1988-89 data (24) reveal that older U.S. travelers (age 55 and over) traveled farther (average 1070 miles) and stayed away longer than any other age group. A majority of older travelers cite visiting friends and relatives as the primary purpose of their trip, whereupon they stayed an average of 6.5 nights away from home. According to the Autumn 1989 Travel Market Close-Up (25), 25% of older travelers were singles, 53% traveled as a couple, and 20% were in groups of 3 or more. Eighty percent were traveling for pleasure (visiting friends, relatives, for recreation, or entertainment) and 15% were traveling for business. Another 7% cited personal, family, or other reasons. A majority of the mature travelers (77%) are married, retired (58%), nearly equally likely to be men or women (56% male and 44% female), who own their own homes (90%) and represent smaller households than other age groups. Typically they are not traveling with children. And while there are adults who will make their own travel plans, many prefer the services of professional travel agents. The data show that older people tend to use package tours more frequently than all other age groups. These statistics are consistent with the travel habits of older Americans in general. Segmentation analysis has been used by travel and marketing researchers to explain more specifically the patterns of travel behavior among older people.

SEGMENTATION OF MATURE TRAVELERS

Rosenfeld (17) describes two mature market segments for the travel industry: the "well to do" traveler and the "elderly" traveler. This segmentation is based on age and spending patterns. The first group is younger (50-64) and larger in size (18% of the population), representing a potentially more profitable segment to the travel industry, now and in the long-term. The Well-to-Do travelers are non-retired couples with an average household income of \$30,000. They prefer luxury travel accommodations, are willing to pay for them, and they tend to fly first class at peak times. In contrast, the Elderly travelers are 65+ and represent 11% of the population. With less discretionary income, they travel more often and prefer group travel arrangements. Because they are predominantly retired, the elderly travelers have more discretionary time and fewer family obligations, so they travel at off-peak times. According to Rosenfeld, the travel industry recognizes these group differences and offers special programs according to their needs.

In other research (23), the over-50 resort travelers were segmented on the basis of marital status. Uysal, Zimmerer and Bonn found differences between the married and single older travelers and their motivations for resort travel. While both groups rated "rest and relaxation" as the primary motive for a resort trip, married visitors also wanted "family togetherness" and "time with someone special". Single travelers placed greater emphasis on "fun and entertainment", "feeling safe and secure" and "having lots to do". Similarly both groups ranked "elegant dining" and "having budget accommodations" as their most important trip activities. However, married couples also looked for night club entertainment and sunbathing while singles preferred shopping, live concerts and theater, and having predictable weather. These findings prompt the resort and travel industry to understand the different motivations of married and single mature travelers and to provide a range of activities to deliver customer satisfaction.

Snepenger (20) segmented the Alaskan vacation market by novelty seeking role. Using Cohen's typology of novelty motive, Spenenger found four tourist types: the organized mass tourist, the individual mass tourist, the explorer, and the drifter. The first of these, the organized mass tourist, differed significantly on several variables from the other types. They were the oldest tourists, more often female, who traveled alone or as a couple, made greater use of commercial airlines, spent more money per travel party, and were more satisfied with the value of their trip. Being part of an organized tour, they relied on travel agents to a greater extent than the other three tourist groups. Marketing implications include balancing the novelty and familiarity of the new environment and catering to the security and accommodation needs of an older clientele. One promotion-related suggestion was to use models with similar age and sex characteristics as the organized mass tourists.

A psychographic segmentation scheme for older Americans is offered by marketing research (21). Because different segments require different marketing programs, the authors suggest the use of lifestyle analysis to uncover marketing opportunities. Their cluster analysis presents six different segments: Self-Reliants, Quiet Introverts, Family Orienteds,

Active Retirees, Young and Secures, and Solitaries. The segments vary in their psychographic profiles and in their consumer attitudes and behavior. These differences in lifestyle and demographic variables present a challenge to the travel and leisure marketer. For example, the group that is most socially venturesome and physically active (Active Retirees) is also one of the oldest and least economically advantaged.

THE EFFECT OF ROLE TRANSITIONS

Spending patterns, marital status, propensity for adventure, and psychographics help segment the mature travel market. Another means is by the roles people play out in later life (19). This provides a sociological understanding of the mature market. A role is a socially expected behavior pattern determined by an individual's status in a particular society. Socially constructed norms for behavior are expected of people at different stages of life. They are not instinctive, but learned over time. The transition from student to employee, from newlywed to parent, and from spouse to widow involve different role standards. Yet the standards for role enactment are dynamic. With the tremendous social, political, and technological changes of the last half century, role expectations have changed as well. Thus, the aging process involves a series of role transitions, determined by time and individual experience within the social environment (2).

As people age, they assume new roles in their families, communities, and society at large. Role transitions take place as parents become grandparents, business leaders retire, and married people divorce, are widowed, or re-marry. They may also re-visit roles by returning to school, to work, or to childcare responsibilities. These role changes can be stressful (8). Some refer to this period of life as "roleless", albeit rewarding (11). However, there are roles for the older person in our society, accompanied by expectations. The functional, marital, social, and economic norms that adults become accustomed to change with time. How well older people deal with role transitions is a key to their life satisfaction. Life satisfaction is to consider life meaningful, to enjoy life, and to maintain a positive outlook. As the numbers of older consumers grow, life satisfaction will be the focus of marketing strategies (3). Travel marketers can ease the stress of role transitions by enhancing life satisfaction.

The travel industry has been a leader in marketing to the mature consumer but services could be enhanced by (1) understanding the impact of roles; (2) by helping older people define their roles better and; (3) by providing life satisfaction through creative travel and leisure services. Marketers can help the mature market assume new roles, re-visit others, and by creating new and positive role images. Travel and leisure can and will be a big part of the older person's lifestyle. To gain a better understanding of mature travelers' needs then, travel marketers must examine the roles that accompany aging so that they can respond to them and enhance them.

ENHANCING LIFE SATISFACTION

Role transitions lead to stress. Carefully designed marketing activities can reduce this stress. Travel contributes to a sense of

continuity of lifestyle for the older person (11) and increases life satisfaction and more specifically, leisure satisfaction. Increased leisure satisfaction contributes to a positive self-image. Leisure satisfaction is "the fulfillment of certain personal needs through leisure activities" (16, p. 336). There are six dimensions to leisure satisfaction; psychological, educational, social, relaxational, physiological and aesthetic. Depending on the complexity of the service, the travel or leisure experience can provide satisfaction on any or all of these dimensions. Travel can provide leisure satisfaction to a group of consumers with specific needs and wants. For example, the older consumer has an increased appreciation for activities and experiences (3). This uncovers the need for different types of travel packages to increase new experiences, experiential types of vacations, and new types of adventure that provide enjoyment and stimulation for the older traveler (10).

ROLE TRANSITIONS AND THE TRAVEL MARKETING RESPONSE

The role transitions that take place in later life occur in private relationships and on a wider social level. Functional, marital, social, and economic role changes are presented here and appropriate traveling marketing responses are offered.

FUNCTIONAL ROLE TRANSITIONS

In mature households, the family orientation has changed. Children have grown up and moved out and the parents enter the empty nest stage of the family life cycle. Parents don't have as much opportunity to play out the functional role of parent. Nor do they hold the authoritarian position they once did. These changes are expected and often welcomed (19). In addition, the older couple may assume the new role of grandparents. They now have multiple roles to enact and may experience role conflict as they cope with this new identity. This conflict may be assuaged by opportunities to interact as a family and with all age groups.

The trends in travel encourage this interaction. Intergenerational trips are becoming popular. The Smithsonian Institute has family travel programs, including a cruise to the Virgin Islands to study reef ecology. American Youth Hostels offers cycling vacations for all ages. Grandparent/grandchild tours are the specialty of GrandTravel, a Chevy Chase, Maryland agency. Their packages appeal to the adventurous; cruising Dutch canals by barge and going on safari in Kenya. Saga International, a Boston travel agency for the mature adult, offers a Disney Winter Break Holiday and trips to the Rockies for grandparents and grandchildren.

The release from active parental responsibilities also allows the mature adult to re-visit roles. Becoming a student again by returning to school is one example of this. Educational vacations to college campuses are a much sought after commodity now. And the benefits of a college education without the stress of grading make it a more enjoyable experience. Most state and a few private universities offer classes on an audit basis to perennial students. Some campuses offer their dormitories for lodging and meal plans, others do not. A nominal fee in some cases is required and perhaps state residency but the benefits are tremendous.

Additionally, alumni associations and other non-profit organizations such as Elderhostel offer shorter-term educational experiences for the older student-traveler.

MARITAL ROLE TRANSITIONS

The empty nest stage allows a couple to focus on their relationship again. Over time, the older married couple develops a strong sense of intimacy and "we-ness" rather than extreme individuality. Older spouses are more apt to make joint decisions and are less concerned with the "give and take" of their relationship (18). Romantic resort getaways for the older married couple would promote the togetherness they desire (23). The role transition to widowhood abruptly changes this scenario. The role of widow(er) is defined by loss of a spouse. The sole survivor must adjust to the loss and the new role. The loss can be eased by social activity. Travel and leisure opportunities increase social contact and help to relieve the stress of companion loss (1).

One organization that focuses on the singles market is Golden Companions of Pullman, Washington. This travel service coordinates a network of 1000 over-50 singles. Members from around the world receive a bimonthly newsletter packed with information about travel resources and discounted services. A mail exchange service helps members find travel companions. Golden Companions also offers group trips and get togethers in major cities.

SOCIAL ROLE TRANSITIONS

The older person, single or married, faces a number of social stereotypes. Due to an ageist society, older people are thought to be weak and slow (6). Negative attitudes toward the aged decrease their life satisfaction and cause role stress. Today, the reality is that older people are in better physical shape due to increased fitness, health, and advanced medical technology. They feel 10-15 years younger than their actual chronological age (28). If single, they are dating and taking advantage of social opportunities they might otherwise miss if restricted by role expectations. Dining, dancing, and dating services are used by over-50 singles as well as younger people. Using realistic, positive images of older people in promotions is one way to combat these stereotypes (20).

Another role transition for those over 55 is a change in reference groups (friends, close family, neighbors) due to relocation, remarriage, death, and institutionalization (8). By designing travel and recreational activities that are more in line with the leisure demands of the mature market, social transitions may be eased. Trips to local art museums, athletic events, and shopping tours are very popular with older people. In fact, the mature traveler is more likely to choose an organized tour. The U.S. Travel Center data cited a primary purpose for travel by the mature market was to visit friends or family. Mature travelers, in many cases, are fulfilling their social needs by visiting friends and family rather than exotic places (20).

ECONOMIC ROLE TRANSITIONS

The demographic profile of mature travelers shows a majority are retired. The role transition from worker to retiree affects people differently. Research shows retirement to be a less traumatic experience if the individual is psychologically and financially prepared (8, 13). Many look forward to this time to start a new career, volunteer their services, or increase previously foregone leisure activities (2). As for financial preparedness, those over 65 have a median net worth more than double that of the general population (10). And, between 1980 and 1995, the income levels of the pre-retired and retired will have increased significantly (9). Despite the apparently healthy financial status, retired people are concerned with value, stemming in part from their experience with the Great Depression (12). Future mature cohorts will have different life experiences as they age and may not share the same concern.

In the meantime, discounts abound based on the thrifty stereotype of older people (14). According to van der Merwe (26), the marketing emphasis in promotions to older people should be on the quality of the service provided. At a discount, travel services will be perceived as a value and more will be purchased. Nearly all motel chains, bus and train services and rental car companies offer discounts with proof of age. Disney has a Magic Years Club for members over 60, offering discounts at Disneyland and Disney World. TWA and American Airlines have senior citizen discount cards and programs, United Airlines has Silver Wings Plus, and Continental offers a Freedom Passport. Golden Age Passports offered by the Federal Government admit persons aged 62 and over to parks, national wildlife refuges, monuments, and recreation areas which charge entry fees. The Passport entitles the visitor to a 50% discount on camping, boating and parking privileges. In the period 1986-1988, the sales of these passports increased 89% to over one half million sold (5). Clearly the mature market is welcoming these marketing efforts.

CONCLUSION

The mature market is important to the travel industry. As the number of older consumers increases, so will their spending power. Traditionally, they have looked to travel as an "indulgence" in their later years. And travel and leisure marketers have responded to this segment in the past. Older travelers rely on professional travel services to provide leisure satisfaction. Leisure satisfaction can be enhanced further by understanding the role transitions that older people face. Functional, marital, social, and economic role changes often create stress. The mature market is looking for ways to enact their new roles and reduce any role conflict they may feel. Creative and progressive travel options encourage mature travelers in their role enactment. Providing services which correspond to the needs of the mature market will distinguish the successful travel marketer in the future.

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